

Asset Allocation

305 306 308 310

Investor Profile Advanced Asset Allocation Portfolio Construction Portfolio Monitor

Investment Basics

Investment Princip

Stocks

Mutal Funds

Money Markets

Investment Process

Asset Allocations

Goal Planning/Calcu

Retirement

House / mortgage

College

One-Click Diversific

Security Screening

Investment FAQs

Investment Glossary

Tax Savings Investm

Premier Services

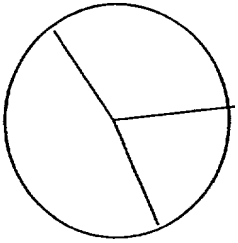
Product and Service

DB Research

1

Defensive

402



Text description

406

Click in an asset class to obtain historical information (other classes will go dark or fade)?

% Cash Equivalents

% Fixed Income

% Equity

Ytd

3mo

1yr

3yr

410

One-Click Diversification

Save as Watch Portfolio

412

Returns

vs. Indx

Vol.

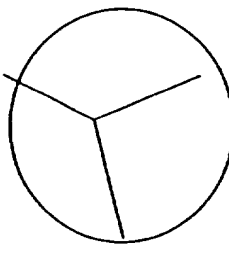
Hi

Lo

2

Defensive / Conservative

404



Text description

5

Aggressive

408

One-Click Diversification

Save as Watch Portfolio

412

Returns

vs. Indx

Vol.

Hi

Lo

300

305 306 308 310

Portfolio Construction Tool

Investor Profile Advanced Asset Allocation Portfolio Construction Portfolio Monitor

Portfolio Construction Tool

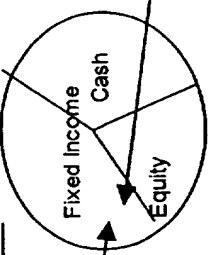
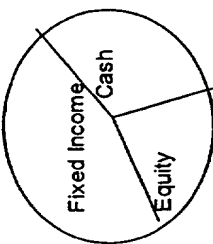
The following tool will enable you to construct a new portfolio or to modify your existing MaxBlue portfolio based upon an Asset Allocation benchmark of your choice, a goal(s) based investment target, or self-directed.

Please make a selection to fill in the pie chart (or other information) on the left side of the screen. Then choose what type of portfolio you would like to construct or modify, in pie-chart form, on the right side of the screen.

Portfolio Construction / Modification for John Doe

Asset Allocation Benchmark, 500 Your Portfolio (Acc # / file name) 502
 Goal(s) Based, or Self Directed ☐ One-Click Diversification
 (click and choose one) Portfolio Description / file name
 Asset Allocation Description / file name
 (if Asset Allocation Benchmark is chosen)

R\$ Amount to Invest / or Invested



Click on an asset class if you would like to change allocations

%	Cash Equivalents	%	Cash Equivalents	Diff
100%	Fixed Income	%	Fixed Income	
	Equity	%	Equity	

must equal 100% to view returns

The figures below will change as you add securities to your portfolio

%	Cash Equivalents	%	Cash Equivalents	Diff
	Fixed Income	%	Fixed Income	
	Equity	%	Equity	

Ytd 3mo 1yr 3yr From ____ To ____

Returns vs. Indx Vol. Hi Lo Returns vs. Indx Vol. Hi Lo

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- DB Research

Manage [and Monitor] Portfolio 300

Investor Profile Advanced Asset Allocation Portfolio Construction Portfolio Monitor

Manage Portfolio

The following tool will enable you to monitor and manage each of your MaxBlue portfolios to the appropriate Asset Allocation benchmark or Goal which you may have used to construct the portfolio.

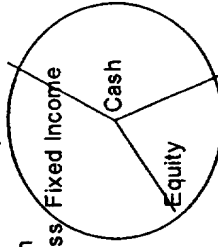
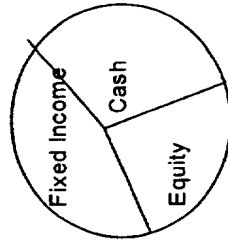
Please select the portfolio which you would like to monitor / manage and view on the right side of the screen.

Manage Portfolio

Asset Allocation Benchmark
or Goal Portfolio
(click and choose one) 602

Your Portfolio (Acc # / file#)
(click and choose one) 604

Return to Portfolio Construction
or Security Screening / Selection



The figures below will change (but may be unconfirmed) as you change your portfolio.

% Cash Equivalents	% Cash Equivalents	Diff
% Fixed Income	% Fixed Income	
% Equity	% Equity	
Ytd	Ytd	
3mo	3mo	
1yr	1yr	
3yr	3yr	
From Inceptn	From Inceptn	
From To	From To	

Fig. 6

300